Paper Paperboard & Wood Pulp

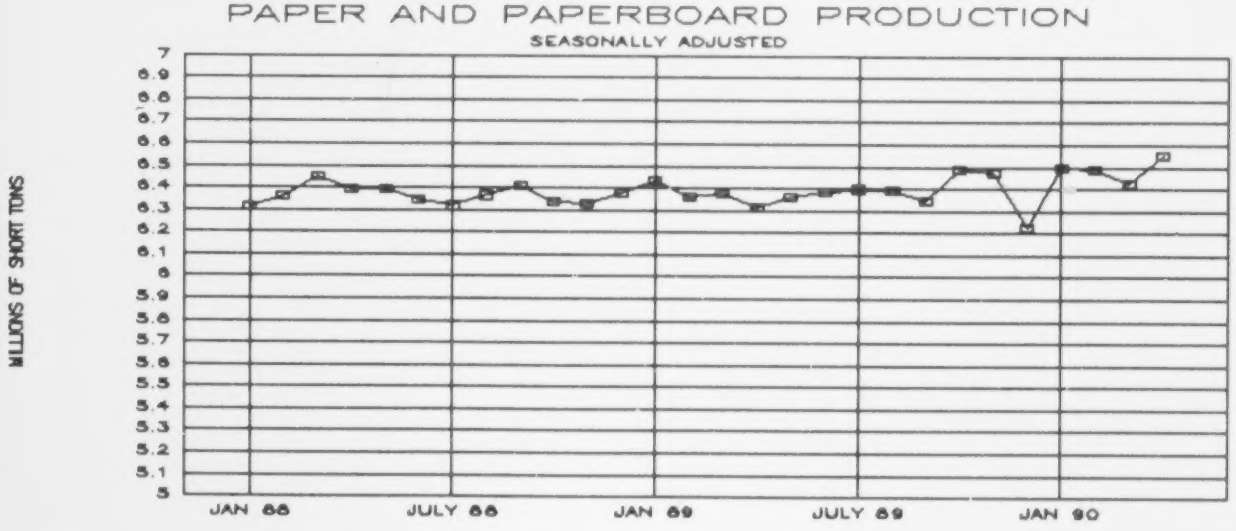
MONTHLY STATISTICAL SUMMARY - Vol.68 No.5 MAY 1990

PAPER AND PAPERBOARD CONTINUES TO INCH UPWARD

The seasonally adjusted rate of paper and paperboard production pierced the high end of its 1988-1989 range during the first four months of 1990, with the April 1990 rate about 1% ahead of January (see chart below). The four-month seasonally adjusted rate, at a record high of 77.9 million tons per year, was 1.9% above its year-earlier level. The paper production trend was somewhat stronger than paperboard's, but in both instances the April rate marked the year-to-date high.

Paper: Total paper production in April, at 3,222,000 tons, gained 5.6% from its April 1989 level, bringing the seasonally adjusted year-to-date annual rate to 39,248,000 tons, 3.1% higher than its year-ago level. Newsprint production is excelling in the face of a generally flat trend in newsprint consumption. The January-April production total was up 9.3% from its four-month 1989 figure, reflecting the output of the three new machines -- one of which uses old newspapers for its fiber -- that came onstream late last year.

The year-to-year advance in the printing-writing grades remained equal to that of paper. Coated paper shipments rose 2.7% in the face of reductions in magazine advertising linage as some publishers elected to increase inventories. Shipments of uncoated free sheet papers strengthened from their late-1989 levels, with their January-April 1990 rise nearly matching paper's 3.1%.



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Tissue papers are also turning in a positive performance, with their four-month 1990 annual rate at 5.68 million tons, slightly more than the high registered last year.

Paperboard: Led by a surge in production of mottled white linerboard, unbleached kraft linerboard production in January-April 1989 was 1.8% ahead of its year-ago volume. Production of mottled white unbleached kraft linerboard achieved an all-time monthly high of 113,000 tons in April, placing the total for the first one-third of this year 15% above its comparable 1989 total. Although production of unbleached kraft paperboard for export eased in April, its year-to-date total still exceeded its 1989 pace by 3.3%.

Total corrugating medium barely kept pace with its year-ago levels, with production of the semichemical grade showing a small decline, offset by a 7% rise in the recycled sector. Mill inventories of recycled corrugating medium have moved along a flat trend since the start of the year, while semichemical inventories have risen. Total inventories of corrugating materials at mills and plants as of April 30, 1990 were unchanged from their April 30, 1989 total.

Containerboard inventories at mills and box plants dropped to 5.3 weeks of supply at the end of April from the month-earlier 5.8 weeks of supply, similar to the pattern they displayed last year. The current level compares with 5.9 weeks of supply as of the end of 1989 and 5.1 one year ago.

In sum, production of containerboard for domestic use showed a 0.7% expansion from its four-month 1989 total, matching almost exactly the 0.8% rise in shipments of fiber boxes.

Demand for packaging boxboard remains steady, with the January-April 1990 total up 2% from its January-April 1989 level. The recycled and solid bleached grades were off a bit, offset by increases in kraft folding boxboard and solid bleached board exports.

The seasonally adjusted year-to-date annual rate of total paperboard production has risen steadily in each month of 1990 relative to its 1989 performance and, after a strong performance in April, was nearly a full percentage point above its comparable 1989 rate.

FIBROUS MATERIALS

U.S. shipments of chemical paper grade market wood pulp lagged their year-ago volume by 5% in the first four months of 1990, but were only 3% below the average of the full year 1989. Exports to Japan were down 29%, while domestic shipments were off 9% from year-ago levels. U.S. shipments to Western Europe and Other Markets -- including the Nordic countries -- ran 5% and 9% ahead of their respective 1989 totals.

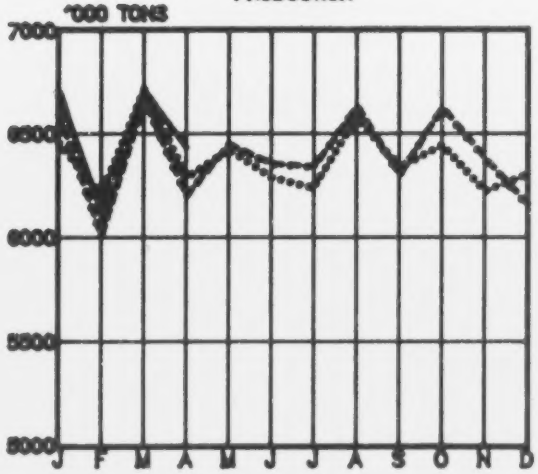
PAPER AND PAPERBOARD STATISTICS PRODUCTION, SHIPMENTS AND ORDERS (Thousands of Tons)	YEAR 1988	YEAR 1989	JAN 1990	FEB 1990	MAR R 1990	APR P 1990	Annual Rate Y-T-D 1990	% Change From Same Period Last Year
PAPER								
Newsprint – Production	5,982	6,088	553	510	543	541	6,440	9.3
– Shipments	5,969	6,079	548	515	543	544	6,452	11.4
Printing & Writing: Total Shipments	21,857	21,540	1,932	1,780	1,895	1,820	22,261	2.9
Groundwood Paper – Shipments	1,624	1,754	157	142	150	155	1,809	4.2
– New Orders	1,654	1,784	162	150	126	129	1,698	0.1
– Unfilled Orders	208	211	190	200	186	147	147	-17.4
Coated Papers – Shipments	7,359	7,194	643	578	614	567	7,209	2.7
– New Orders	7,412	7,262	610	531	643	656	7,322	7.9
– Unfilled Orders	751	822	671	622	658	747	747	15.6
Unctd Free Sheet – Shipments	11,277	11,043	996	930	983	971	11,638	2.9
– New Orders	11,298	11,132	960	992	1,068	1,023	12,128	10.2
– Unfilled Orders	790	784	673	746	846	873	873	41.5
Thin Papers – Shipments	281	245	23	21	26	23	276	7.4
Cotton Fiber Paper – Shipments	167	157	13	14	15	13	166	-0.8
Bleached Bristols – Shipments	1,150	1,148	100	96	106	92	1,183	1.6
Tissue Paper – Production	5,476	5,636	474	452	500	467	5,676	1.9
Total Packaging & Other Paper	5,047	4,925	418	380	417	394	4,824	-2.6
Unbl. Kraft Paper – Shipments	2,800	2,681	216	190	211	192	2,429	-10.3
Other Paper – Production	2,247	2,243	202	189	206	202	2,395	6.7
TOTAL PAPER PRODUCTION – UNADJUSTED	38,363	38,189	3,377	3,121	3,354	3,222	39,222	3.0
TOTAL PAPER PRODUCTION – SEAS ADJ			3,290	3,300	3,205	3,287	39,248	3.1
PAPERBOARD – PRODUCTION								
Containerboard	26,225	26,428	2,284	2,052	2,302	2,200	26,516	0.9
Cont'bd For Dom Use for Fibre Boxes	23,563	23,752	2,027	1,819	2,039	1,977	23,586	0.7
Total Linerboard	16,177	16,399	1,389	1,248	1,409	1,359	16,216	0.8
Unbleached Kraft	15,601	15,833	1,352	1,224	1,366	1,325	15,798	1.8
Solid Bleached	170	178	13	8	14	11	140	-15.0
Recycled	407	388	25	16	28	24	278	-29.8
Corrugating Medium	7,351	7,339	637	570	629	618	7,361	0.4
Semichemical	5,528	5,554	478	419	472	456	5,471	-1.6
Recycled	1,823	1,785	159	152	157	162	1,890	7.0
Container Chip and Filler	35	14	1	1	1	0	10	-45.0
Other Containerboard for Dom Use	320	307	23	18	26	22	269	-11.2
Containerboard for Export	2,342	2,369	234	215	237	201	2,661	4.5
Boxboard	11,878	12,029	1,029	946	1,050	1,002	12,079	0.5
Boxboard for Packaging for Dom Use	7,014	7,076	611	559	621	588	7,134	1.1
Folding Boxboard	5,293	5,370	463	422	472	426	5,348	-0.2
Solid Bleached	2,017	1,980	163	152	165	147	1,877	-4.2
Unbleached Kraft	924	987	86	83	92	83	1,032	8.4
Recycled	2,353	2,403	214	187	215	196	2,439	-0.4
Set-up Boxboard for Dom Use	279	288	27	26	27	29	328	9.6
Milk Carton & Food Service Dom Use	1,442	1,419	120	111	122	133	1,458	4.0
Other Boxboard for Domestic Use	4,075	4,089	345	313	348	338	4,035	-2.7
Boxboard for Export	789	863	73	74	81	76	910	12.3
Paperboard Production by Furnish	38,103	38,456	3,313	2,998	3,352	3,202	38,595	0.8
Unbleached Kraft	19,140	19,490	1,687	1,536	1,715	1,627	19,694	2.2
Semichemical	5,664	5,691	490	430	485	466	5,613	-2.0
Solid Bleached Kraft	4,511	4,521	384	356	388	378	4,517	2.7
Recycled	8,788	8,754	752	677	763	731	8,770	-1.3
Paperboard Production for Export	3,132	3,227	306	289	318	264	3,532	5.5
Unbleached Kraft	2,296	2,373	226	211	231	197	2,596	3.3
Semichemical	136	137	12	12	13	10	142	-12.0
Bleached Kraft	628	683	64	64	69	52	748	17.4
Recycled	72	34	4	2	4	4	46	26.8
TOTAL PAPERBOARD PRODUCTION – UNADJ	38,103	38,456	3,313	2,998	3,352	3,202	38,595	0.8
TOTAL PAPERBOARD PROD – SEAS ADJ			3,206	3,185	3,220	3,266	38,628	0.7
PAPER AND PAPERBOARD – UNADJ	76,466	76,646	6,689	6,119	6,706	6,425	77,817	1.9
PAPER AND PAPERBOARD – SEAS ADJ			6,496	6,485	6,425	6,553	77,876	1.9

R – Revised P – Preliminary Seas. Adj. – Seasonally Adjusted Unadj – Not Seasonally Adjusted

TOTAL PAPER AND PAPERBOARD

PRODUCTION

'000 TONS



MARKET WOOD PULP

PRODUCTION

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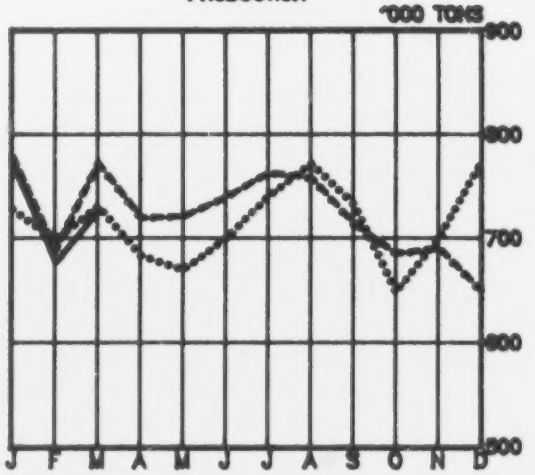

TOTAL PAPER

PRODUCTION

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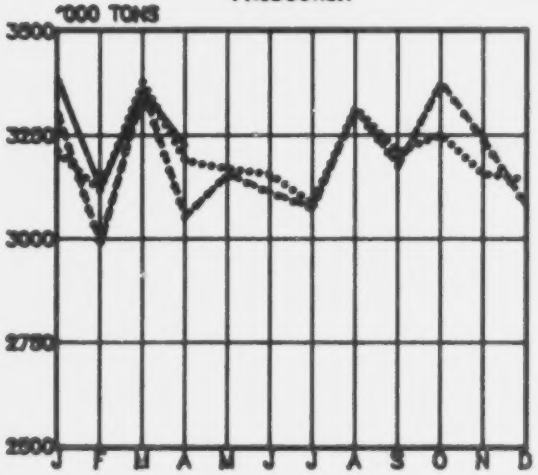

TOTAL PAPERBOARD

PRODUCTION

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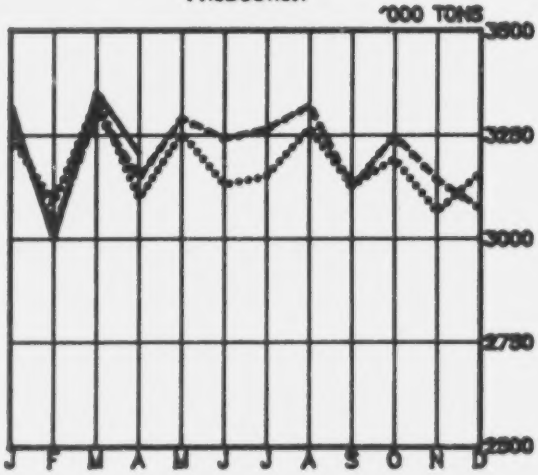

TOTAL WOOD PULP

CONSUMPTION

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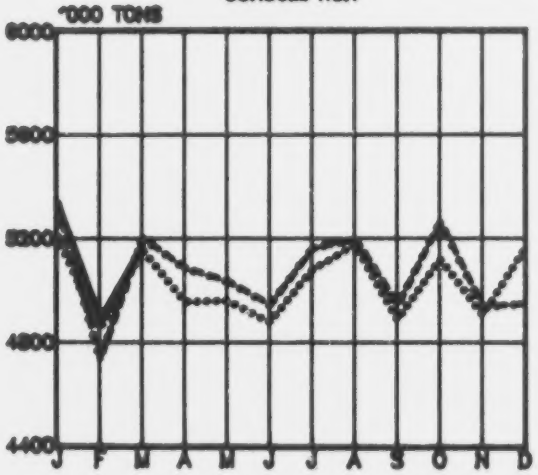

TOTAL WASTE PAPER

CONSUMPTION

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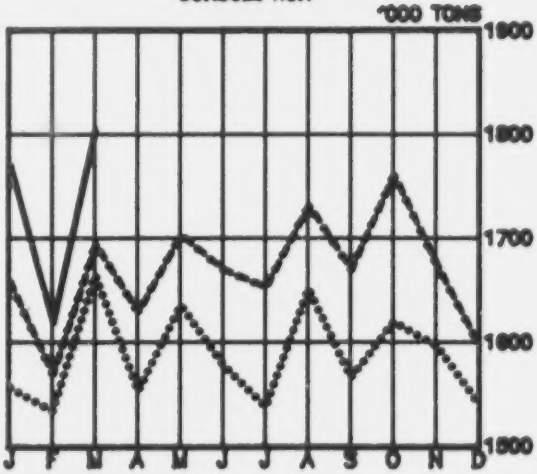

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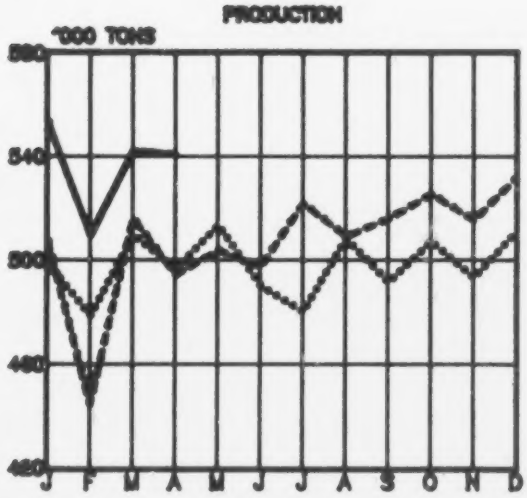
WOOD PULP STATISTICS (Thousands of Tons)			YEAR 1988	YEAR 1989	DEC 1989	JAN 1990	FEB R 1990	MAR P 1990	Annual Rate Y-T-D 1990	% Change From Same Period Last Year
TOTAL WOOD PULP										
Total Wood Pulp	Production		61,161	61,998	4,991	5,480	4,988	5,261	62,914	1.1
	Imports	A	5,038	5,005	398	413	425	429	5,066	-2.0
	Exports		5,528	6,231	585	420	410	578	5,632	-11.3
	New Supply		60,671	60,772	4,805	5,473	5,002	5,112	62,348	2.1
Dissolving Pulp	Production		1,367	1,425	117	125	89	123	1,347	-9.0
	Imports		248	284	21	17	20	23	241	-23.1
	Exports		865	836	90	58	52	71	725	-13.6
	New Supply		751	873	48	85	57	74	863	-9.5
Paper Grades	Production		49,493	50,181	3,995	4,418	4,050	4,272	50,958	1.0
Chemical Pulp	Imports	A	4,419	4,370	343	372	368	373	4,452	-2.9
	Exports		4,612	5,325	490	357	355	503	4,860	-10.4
	New Supply		49,300	49,226	3,848	4,434	4,063	4,141	50,550	1.9
Groundwood and	Production		5,943	6,029	523	548	509	501	6,233	6.9
Thermo-Mech	Imports	A	371	351	34	23	37	33	373	36.6
	Exports		51	70	5	6	3	3	47	-44.3
	New Supply		6,263	6,309	552	566	543	532	6,559	9.0
Semi-Chemical	Production		4,358	4,363	357	389	340	365	4,376	-1.7
	Imports									
	Exports									
	New Supply		4,358	4,363	357	389	340	365	4,376	-1.7
MARKET WOOD PULP										
Total Market	Production		8,565	8,664	648	770	675	725	8,675	-3.0
Wood Pulp	Imports		3,471	3,340	282	266	260	249	3,101	-7.4
	Exports		5,071	5,310	501	311	434	508	5,014	-7.1
	New Supply		6,966	6,694	429	725	501	465	6,763	-1.9
Dissolving Pulp	Production		1,365	1,422	117	125	89	122	1,346	-8.9
	Imports		206	210	17	7	17	18	167	-21.6
	Exports		798	821	93	64	53	75	768	-9.1
	New Supply		774	810	41	68	53	65	746	-11.8
Paper Grades	Production		7,200	7,242	531	645	585	602	7,328	-1.8
Chemical Pulp	Imports		3,126	3,072	261	257	242	229	2,913	-5.7
	Exports		4,273	4,489	409	247	381	433	4,246	-6.7
	New Supply		6,052	5,825	384	654	446	399	5,995	-0.1
Groundwood Pulp	Production		0	0	0	0	0	0	0	0.0
and All Other	Imports		139	58	3	2	2	2	22	-55.7
	Exports		0	0	0	0	0	0	0	0.0
	New Supply		139	58	3	2	2	2	22	-55.7

SOURCES: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp Division, Pulp, Materials and Technology Group, API. Total Wood Pulp Imports & Exports - Department of Commerce.
NOTE: A - API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data.

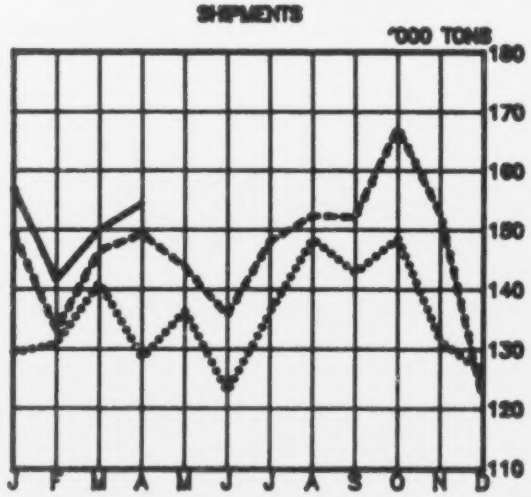
FIBROUS RAW MATERIALS (Thousands of tons)	YEAR 1988	YEAR 1989	DEC 1989	JAN 1990	FEB R 1990	MAR P 1990	Annual Rate 1990	% Change From Same Period Last Year
CONSUMPTION AT PAPER & PAPERBOARD MILLS								
Total	79,315	80,739	6,540	7,098	6,504	6,975	82,307	2.1
Total Wood Pulp	60,294	60,725	4,945	5,330	4,887	5,171	61,550	0.9
Waste Paper	19,021	20,014	1,596	1,768	1,617	1,804	20,757	5.5
INVENTORIES								
Chemical Paper Grade Market Pulp								
Producers' Own-Use Inventories	172	179	193	192	215	203	203	13.2
Producers' Market Inventories	261	279	342	518	531	486	486	74.3
Consumers' Purchased Inventories #	622	592	519	539	542	475	475	-19.7
Waste Paper at Paper & Bd. Mills	1,044	1,058	1,095	1,107	1,055	1,031	1,031	-2.6
Days of Supply at Pulp Mills of								
Chemical Paper Grade Mkt Pulp	14	13	19	30	29	26	26	100.0

SOURCES: Wood Pulp Data, Pulp Division, Pulp, Materials and Technology Group, API. Waste Paper Data, Paper Recycling Committee, API.
Includes all grades of wood pulp
P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons

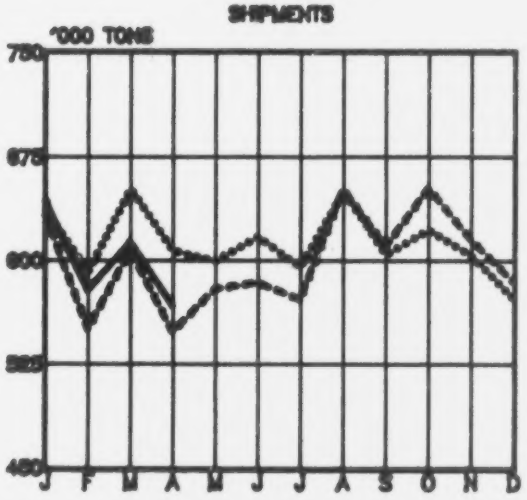
NEWSPRINT
PRODUCTION



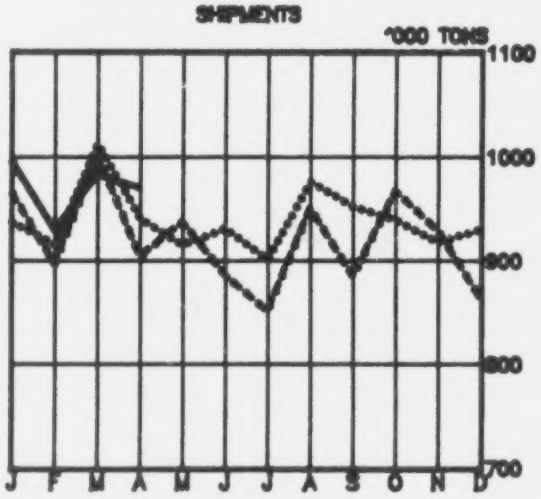
GROUNDWOOD PAPER, UNCOATED
SHIPMENTS



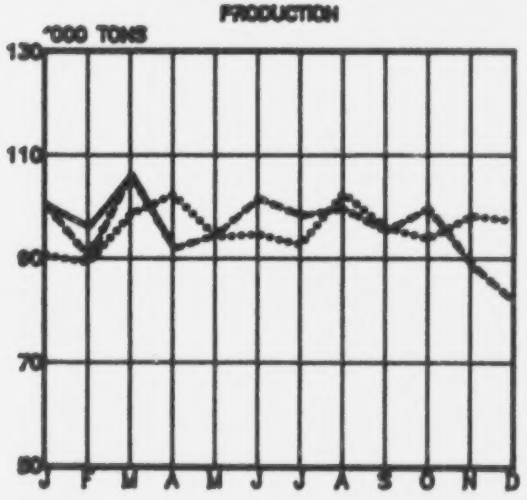
COATED PAPER
SHIPMENTS



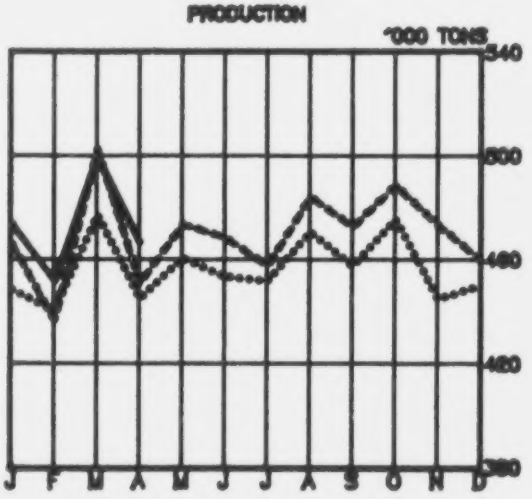
UNCOATED FREE SHEET PAPERS
SHIPMENTS



BLEACHED BRISTOLS
PRODUCTION



TISSUE PAPER
PRODUCTION



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FIBROUS RAW MATERIALS (Thousands of Standard (128 Cu. ft.) Cord	YEAR 1988	YEAR 1989	DECEMBER 1989	JANUARY 1990	FEBRUARY 1990	MARCH 1990	ANNUAL RATE Y-T-D 1990	% CHANGE FROM SAME PD LAST YEAR
PULPWOOD								
Total U.S. – Total Receipts	96,537	99,279	7,844	8,741	8,215	8,260	100,864	4.1
– Total Consumpt	95,497	98,414	7,936	8,553	8,108	8,341	100,008	2.6
– Residues *	33,186	34,539	2,808	3,100	2,854	2,927	35,524	5.5
– Inventories	4,888	5,462	5,462	5,571	5,597	5,433	5,433	21.0
So. Atlantic – Total Receipts	31,582	31,982	2,474	2,685	2,691	2,780	33,424	6.2
– Total Consumpt	31,567	32,239	2,585	2,783	2,636	2,760	32,678	1.5
– Residues *	9,897	9,961	833	1,015	877	924	11,264	12.5
– Inventories	1,200	936	936	1,000	1,017	1,036	1,036	1.5
Northeast – Total Receipts	7,187	7,242	596	692	649	586	7,706	-2.8
– Total Consumpt	7,216	7,072	538	639	591	607	7,348	0.2
– Residues *	1,664	1,575	108	127	125	126	1,512	-16.2
– Inventories	572	522	522	553	599	549	549	-17.7
South Central – Total Receipts	33,751	36,640	2,788	3,057	2,966	3,113	38,644	7.3
– Total Consumpt	33,646	35,791	2,891	3,064	3,019	3,077	36,640	5.3
– Residues *	9,890	10,539	844	924	919	938	11,116	10.5
– Inventories	1,160	1,336	1,336	1,304	1,172	1,221	1,221	26.4
North Central – Total Receipts	6,866	7,020	561	668	660	540	7,552	1.3
– Total Consumpt	6,929	6,963	561	831	571	595	7,188	3.4
– Residues *	1,334	1,422	126	112	104	108	1,296	-12.2
– Inventories	839	936	936	999	1,081	1,030	1,030	18.4
West – Total Receipts	16,152	17,196	1,405	1,419	1,249	1,241	15,636	-2.2
– Total Consumpt	16,139	16,349	1,361	1,436	1,291	1,312	16,156	-0.3
– Residues *	10,401	11,042	897	922	829	833	10,336	0.2
– Inventories	1,117	1,730	1,730	1,715	1,728	1,598	1,598	66.6

* – Consumption of Residues in cords equivalent

SOURCE: American Pulpwood Association

UNITED STATES TRADE WITH CANADA		IMPORTS FROM CANADA * YEAR 1989 Tons	YEAR 1989 ($000)	FEBRUARY 1990 Tons	FEBRUARY 1990 ($000)	MARCH 1990 Tons	MARCH 1990 ($000)	ANNUAL RATE Y-T-D 1990 Tons	% CHANGE FROM SAME PD LAST YEAR
Pulpwood, Roundwood (in cubic meters)		211,061	4,582	0	0	0	0	0	-100.0
Pulpwood chips		792,186	27,339	61,739	2,051	57,947	1,884	678,585	-38.7
Wood Pulp, Total	A	4,353,343	2,599,247	378,635	230,341	393,121	239,833	4,612,690	-0.8
Waste Fibrous Materials, Total		164,217	31,659	11,450	2,760	12,435	2,625	148,516	-26.9
Paper, Board & Products, Total	A	10,986,831	6,104,181	917,689	500,472	985,217	546,345	11,343,368	5.0
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd.	A	10,807,859	5,782,419	906,501	473,543	972,837	515,312	11,203,178	5.9
Paper, Paperboard & Products	A	10,830,545	6,065,466	908,541	496,066	975,848	543,682	11,233,160	6.2
Paper & Paperboard, Only	A	10,661,373	5,743,703	897,363	471,157	963,268	512,849	11,092,970	7.2
Paper, Total	A	10,234,256	5,579,018	859,852	456,896	919,584	496,026	10,638,322	8.7
Newsprint	A	8,330,874	4,278,705	688,371	342,387	721,848	361,185	8,420,890	3.4
Printing, Writing & Rel. Pap.	A	1,579,698	1,069,253	144,501	94,516	168,730	114,874	1,859,873	23.3
Pack. & Ind. Conv. Paper		217,159	119,140	15,557	9,045	19,653	11,170	222,858	-2.7
Special Industrial Paper		49,045	60,344	5,728	5,688	4,822	4,765	70,390	88.1
Tissue Paper		57,481	51,567	5,895	5,261	4,531	4,027	64,511	7.0
Paperboard, Total		417,117	164,666	37,500	14,261	43,665	16,823	454,848	22.0
Convtd Paper&Paperbd Products		179,172	321,762	11,189	28,929	12,530	31,033	140,190	-37.8
Wet Machine Board		293	246	34	24	143	125	1,079	1088.0
Construction Paper & Board		155,993	38,472	9,114	2,362	9,226	2,536	109,129	-62.0

NOTE: A – API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data.

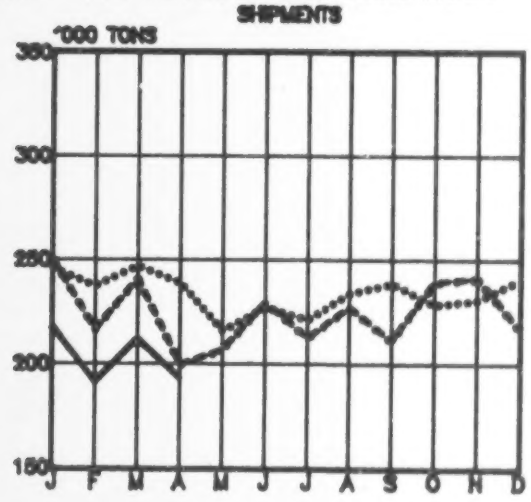
NOTE: 1990 EXPORT DATA NOT FULLY COMPARABLE WITH 1989'S.

	EXPORTS TO CANADA *							
Pulpwood, Roundwood (in cubic meters)	82,892	1,120	36,301	3,830	35,639	3,849	405,684	405584.0
Pulpwood chips	28,218	1,241	9,975	534	24,414	1,153	180,789	838.2
Wood Pulp, Total	352,896	141,272	29,806	14,432	31,414	16,391	392,053	31.1
Cotton Pulp & Other Pulp	6,216	4,249	151	180	465	547	3,827	-51.4
Waste Paper	284,379	38,555	44,012	8,359	54,085	9,918	598,080	89.3
Paper, Board & Products, Total	1,083,228	783,613	87,853	98,708	102,832	113,668	1,183,129	36.4
Paper, Paperboard,Wet Machine Bd. & Constr. Paper & Bd.	754,575	497,470	66,887	63,273	77,080	70,706	885,970	55.0
Paper, Paperboard & Products	1,062,560	755,810	87,761	98,625	102,472	113,445	1,161,736	41.1
Paper & Paperboard, Only	733,907	459,868	66,765	63,190	76,920	70,582	864,577	59.5
Paper, Total	371,206	340,312	41,451	47,933	46,369	51,594	531,115	78.8
Newsprint	8,316	5,891	907	506	1,726	946	20,432	297.8
Printing, Writing & Rel. Pap.	228,021	222,055	31,094	34,727	34,795	38,029	345,396	111.0
Pack. & Ind. Conv. Paper	55,390	29,624	4,053	2,557	4,080	2,986	51,351	26.2
Special Industrial Paper	62,645	72,956	4,580	8,928	4,613	8,407	61,301	-4.7
Tissue Paper	6,834	9,787	837	886	1,154	1,226	12,686	155.2
Paperboard, Total	362,701	149,356	25,314	15,256	30,551	18,968	363,462	37.3
Convtd Paper&Paperbd Products	328,853	266,143	20,996	35,436	25,552	42,863	277,159	3.1
Wet Machine Board	1,626	660	0	0	0	0	0	-100.0
Construction Paper & Board	19,040	7,143	122	83	160	123	1,394	-80.7

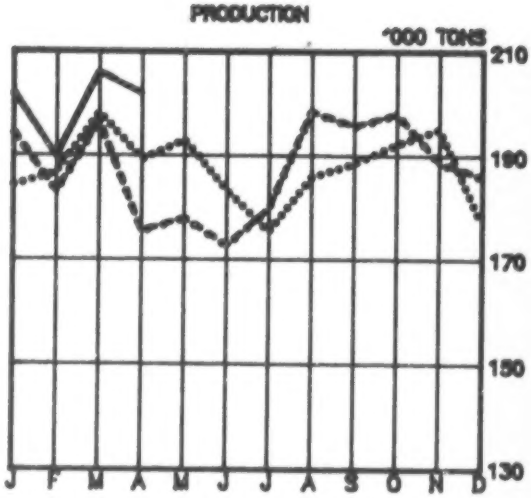
SOURCE: Bureau of Census, Department of Commerce .

E – Estimate of tonnage based on square foot data

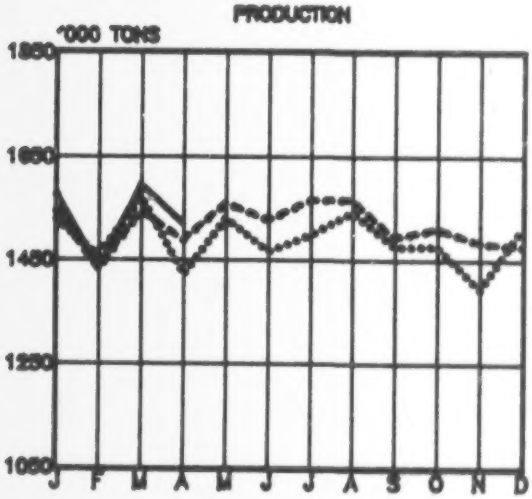
UNBLEACHED KRAFT PACKAGING AND INDUSTRIAL CONVERTING PAPER SHIPMENTS



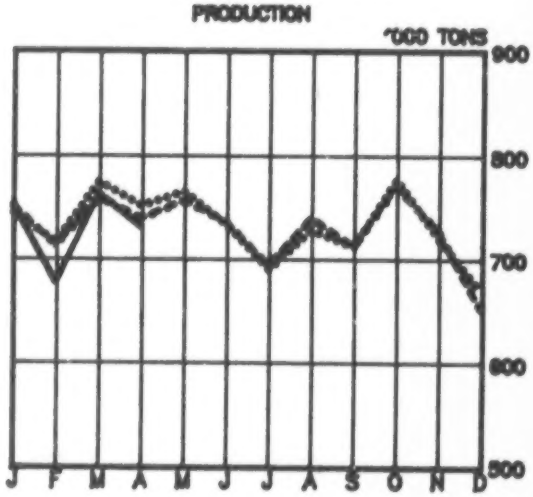
OTHER PAPER PRODUCTION



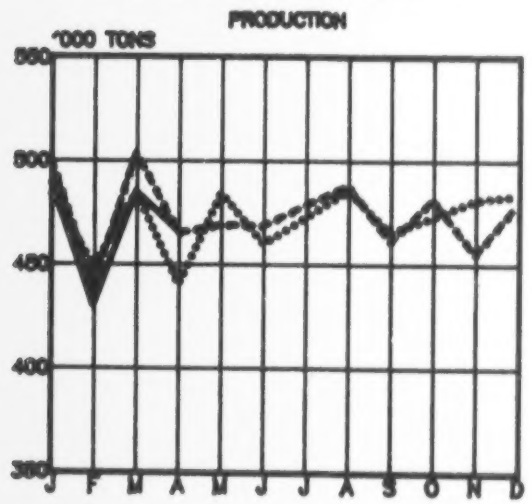
UNBLEACHED KRAFT LINERBOARD PRODUCTION



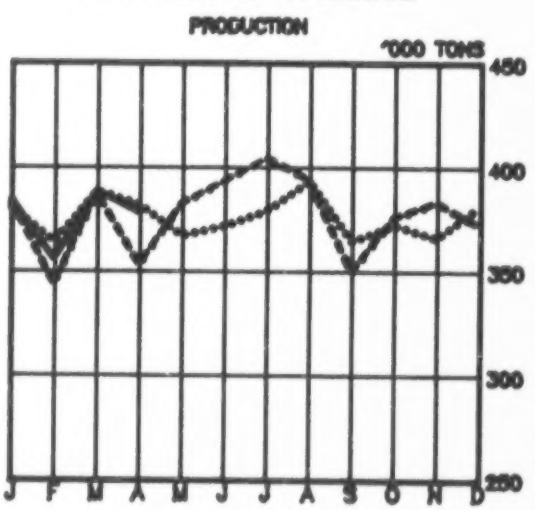
RECYCLED PAPERBOARD PRODUCTION



SEMICHEMICAL PAPERBOARD PRODUCTION



SOLID BLEACHED PAPERBOARD PRODUCTION



1988 ••••••• 1989 -•-•-•-1990 ———

PULP, PAPER AND PAPERBOARD IMPORTS		YEAR 1989		FEBRUARY 1990		MARCH 1990		Annual Rate YTD 1990 Tons (1)	% Change from same Period Last Year
		Tons	$000	Tons	$000	Tons	$000		
Pulpwood Roundwood (cubic meters)		211,061	4,542	0	0	0	0	0	-100.0
Pulpwood Chips		805,381	27,759	61,810	2,073	58,131	1,981	676,718	-39.2
Total All Imports	A	18,284,860	11,352,263	1,479,426	913,470	1,803,790	994,503	18,531,177	0.3
Wood Pulp Total	A	5,005,100	2,980,842	424,736	259,524	429,142	262,189	5,095,366	-2.0
Waste Paper		172,575	33,197	9,861	1,828	11,741	2,234	135,676	-38.4
Other Fibrous Materials		11,254	8,518	1,804	1,153	841	494	15,723	-1.8
Paper Board & Products Total	A	13,099,931	8,329,906	1,043,025	650,965	1,162,056	729,586	13,313,411	1.9
Paper Paperboard Wet Machine Bd. & Construction Paper & Board	A	12,537,474	7,231,648	1,010,787	570,647	1,125,710	644,063	12,904,270	4.0
Paper Ppbd & Prds ex Cnst&WMB	A	12,910,205	8,279,503	1,032,932	647,944	1,151,553	728,218	13,190,497	3.1
Paper & Paperboard Only	A	12,347,748	7,181,244	1,000,594	567,627	1,116,207	640,695	12,781,356	5.3
Paper Total	A	11,814,263	6,900,796	955,514	545,976	1,064,166	618,009	12,230,196	5.1
Newsprint	A	6,553,401	4,379,613	593,508	345,116	733,222	366,618	8,594,982	2.6
Printing & Writing	A	2,732,978	1,996,141	220,263	156,099	286,587	204,120	3,083,132	12.6
Uncoated Groundwood		1,304,114	817,785	87,038	51,977	131,123	79,731	1,325,676	1.8
Coated Print & Impreg. Pap.	A	774,022	632,484	71,110	57,130	87,347	72,294	952,002	39.5
Uncoated Free Sheet	A	583,077	462,404	56,585	40,364	61,037	44,236	733,560	8.9
Thin (except Cigarette)		12,711	15,200	816	739	1,136	1,711	11,218	-28.7
Bristols		59,052	68,267	4,914	5,859	5,444	6,148	60,698	-4.5
Total Pkg & Other Paper		407,087	414,353	32,052	35,929	36,666	37,860	442,472	7.4
Unbleached Kraft Paper		239,303	116,011	15,996	7,999	20,337	10,102	234,629	-6.9
Other Pkg. & Indust. Paper		167,785	298,342	16,057	27,930	16,328	27,578	207,843	30.0
Tissue		120,797	110,691	9,391	8,830	8,194	7,561	109,812	-6.5
Paperboard, Total		533,486	280,446	45,181	21,651	51,040	24,867	561,158	11.7
Test or Containerboard		85,048	34,401	9,605	4,140	13,946	5,729	127,210	74.1
Semi-Chemical Corrugating		118,176	36,462	8,053	2,242	9,954	2,888	107,236	-10.8
Other Paperboard		330,262	209,584	27,523	15,269	27,140	16,069	316,712	5.8
Convtd Paper&Paperbd Products		562,457	1,098,259	32,238	80,318	36,346	85,523	409,141	-36.3
Paper Products, Total		470,471	924,729	24,207	66,531	28,356	70,306	316,294	-44.3
Paperboard Products, Total		91,986	173,529	8,031	13,787	7,990	15,218	92,847	-2.7
Wet machine Board		606	580	62	54	167	151	1,353	320.1
Construction Paper & Board E		189,119	49,824	10,030	2,966	10,338	3,217	121,561	-65.1
Notes									
Other: No Weight Avail. ($000)			136,624		8,576		10,842	108,860	-1.4
Total Imports Incl. Other($000)			11,488,886		922,045		1,005,346	11,656,518	2.0

NOTE: A - API shifted import data from January 1989 to December 1988 to compensate for misallocation of reported data.

NOTE: 1990 EXPORT DATA NOT FULLY COMPARABLE WITH 1989'S.

PULP, PAPER AND PAPERBOARD EXPORTS	YEAR 1989		FEBRUARY 1990		MARCH 1990		Annual Rate YTD 1990 Tons (1)	% Change from same Period Last Year
	Tons	$000	Tons	$000	Tons	$000		
Pulpwood, Roundwood (cubic meters)	137,617	3,475	38,074	3,952	43,039	3,948	478,656	823.0
Pulpwood Chips	4,357,811	388,154	366,661	34,284	340,736	30,476	4,084,406	1.4
Total All Exports	18,633,606	8,603,945	1,379,366	671,696	1,758,341	846,423	18,661,560	0.0
Wood Pulp,Total	6,231,172	3,512,604	410,181	242,753	577,821	330,803	5,632,186	-11.8
Cotton Pulp and Other Pulp	122,045	100,510	11,675	9,506	8,661	8,741	109,897	-7.8
Waste and Old Paper	5,966,820	729,797	457,375	55,904	571,899	71,722	5,219,756	5.5
Paper, Board & Products,Total	6,299,788	4,261,035	500,137	383,508	587,980	435,158	6,718,647	6.6
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	5,259,733	2,982,686	417,296	249,338	507,216	301,030	5,673,658	7.1
Paper, Ppbd & Prod ex Cnst&WMB	6,263,491	4,246,277	499,456	363,150	587,114	434,625	6,711,216	6.9
Paper & Paperboard, Only	5,233,456	2,967,928	416,615	248,982	506,351	300,497	5,686,225	7.7
Paper, Total	1,466,752	1,233,527	115,602	109,796	128,852	121,724	1,502,227	4.8
Newsprint	624,794	357,381	39,560	20,870	39,731	20,233	516,900	-22.1
Printing & Writing	478,201	465,188	53,333	55,988	62,015	64,016	685,220	61.2
Uncoated Groundwood	88,056	64,766	4,005	3,827	8,024	6,507	73,313	-14.8
Clay Coated Paper	168,538	131,418	15,843	15,858	20,962	19,831	218,054	58.8
Uncoated Free Sheet	122,346	166,830	18,304	22,678	21,324	26,080	239,460	136.3
Other Printing & Writing	99,260	102,184	15,181	13,725	11,985	11,508	157,393	54.7
Total Pkg. & Other Paper	342,041	380,790	20,268	29,510	23,822	34,034	266,154	-18.2
Unbleached Kraft	125,818	80,316	8,315	4,383	10,189	6,252	106,193	-10.2
Other Pkg. & Indust. Paper	216,223	320,472	11,973	25,127	13,634	28,782	159,961	-22.8
Tissue	20,712	30,187	2,401	2,429	3,064	3,441	33,954	77.7
Paperboard, Total	3,757,704	1,734,402	301,013	140,196	377,999	178,773	4,162,998	8.8
Solid Wood Pulp	3,572,758	1,646,152	283,366	131,436	358,159	166,683	3,839,466	7.9
Total Linerboard	2,499,718	935,364	208,968	77,351	263,841	97,115	2,900,704	9.2
Bleached Kraft Linerboard	283,113	127,787	22,804	10,610	30,318	13,727	343,897	11.1
Unbleached Kraft Linerbd	2,216,603	807,578	186,164	66,741	233,525	83,388	2,556,807	9.0
Other Unbleached Kraft	248,575	113,315	20,800	10,290	17,981	9,640	250,874	12.9
Other Bleached Kraft	795,305	582,979	61,147	42,701	72,787	60,634	753,200	0.9
Semi-Chemical Corrugating	31,162	14,494	2,471	1,094	3,551	1,295	34,708	37.8
Recycled Paperboard	184,947	88,250	17,627	8,750	19,540	10,090	223,512	27.0
Convtd Paper&Paperbd Products	1,040,035	1,278,349	82,841	114,169	90,763	134,128	1,045,992	2.9
Paper Products, Total	473,435	832,806	32,066	72,644	37,251	83,944	411,208	-12.3
Paperboard Products, Total	566,601	445,543	50,776	41,524	53,513	50,184	634,783	18.0
Wet Machine Board	2,889	1,256	131	54	70	32	889	-69.7
Construction Paper & Board E	33,388	13,501	550	301	796	801	7,442	-77.8
Notes								
Other: No Weight Avail. ($000)		25,855		2,652		4,127	40,893	152.6
Total Exports Incl. Other($000)		8,627,811		674,321		850,550	9,061,060	7.6

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Incl. estim. of tonnage based on square foot data.

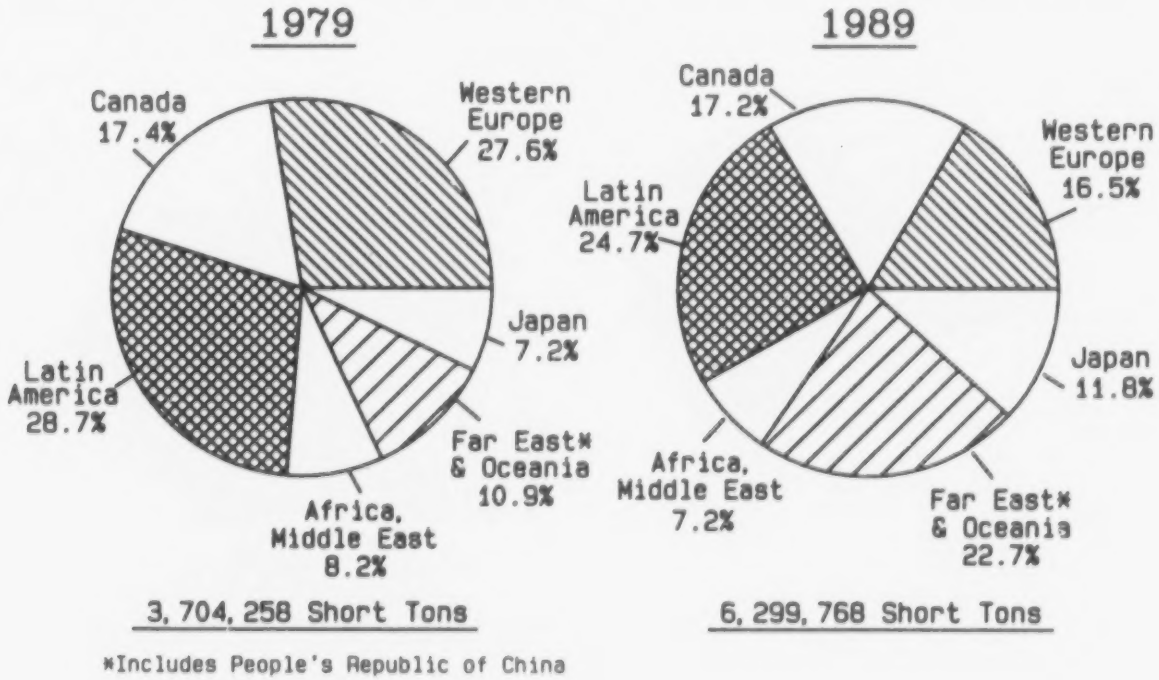
(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES 1982 = 100	YEAR 1988	YEAR 1989	JAN 1990	FEB 1990	MAR 1990	APR 1990	Annual Rate Y-T-D 1990	% Change from same Period Last Year
Pulp, Paper and Products except Building Grades	124.8	132.4	133.4	133.3	133.2	133.4	133.3	1.6
Pulp Paper & Products, ex. Building Grades & ex. Waste Paper *	123.8	132.0	133.1	133.0	132.9	133.2	133.1	1.8
Total Wood Pulp	136.7	157.4	159.8	160.3	158.0	154.3	158.1	3.2
Total Paper	123.2	129.6	128.0	127.5	127.4	127.8	127.7	-1.9
Writing Paper, exc. Newsprint	123.4	130.5	128.4	127.9	127.7	128.3	128.1	-2.3
Newsprint	127.6	122.5	117.9	115.1	115.3	115.1	115.9	-8.3
Total Paperboard	133.2	140.1	138.8	138.4	138.5	137.8	138.4	-1.0
Total Paper and Paperboard *	126.4	132.9	131.4	130.9	130.9	130.9	131.0	-1.6
Converted Products	123.0	131.7	134.5	134.6	134.6	135.6	134.8	4.1
Waste Paper	183.6	157.1	151.4	149.7	149.3	145.3	148.9	-6.2
All Commodities	106.9	112.2	114.9	114.4	114.2	114.0	114.4	2.8
Industrial Commodities	106.3	111.6	114.2	113.6	113.2	113.1	113.5	2.7

SOURCE: Producer Price Indexes' Bureau of Labor Statistics, U.S. Department of Labor * Computed by API

EXPORTS OF PAPER, PAPERBOARD AND CONVERTED PRODUCTS

Percent Distribution of U.S. Exports by Major Area of Destination



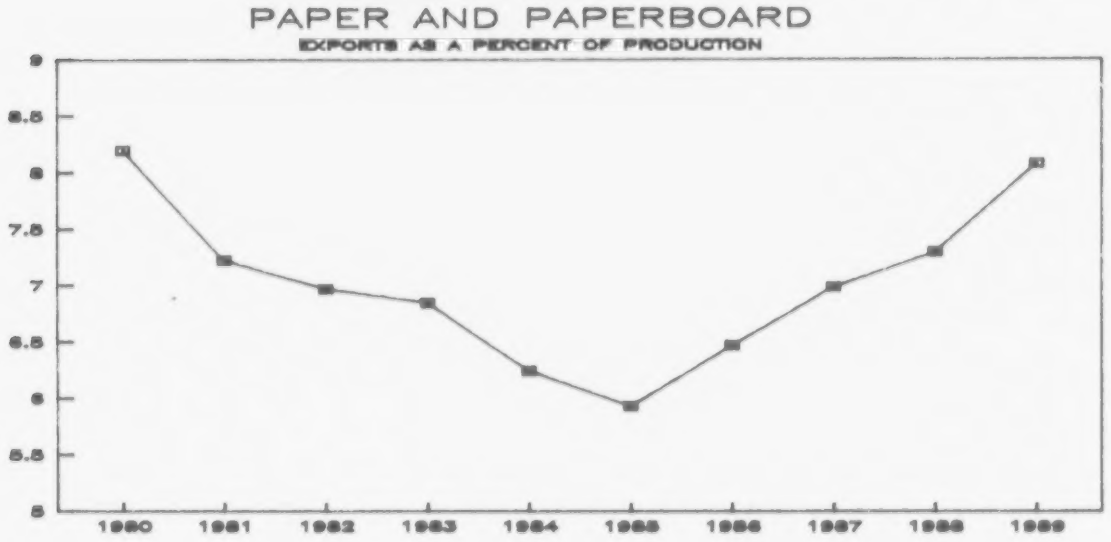
*Includes People's Republic of China

Inventories of chemical paper grade market wood pulp held by U.S. producers moved down from their January 1990 high of 30 days of supply to 22 days of supply as of April 30. Consumers' purchased pulp inventories of 30 days of supply at the end of April 1990 receded to the first quarter 1988 level after peaking at 40 days of supply at the end of September 1989.

Inventories of waste paper at the end of March were down only marginally from year-ago levels and the 1989-1990 pattern remains stable. On a grade-by-grade basis, inventories of old newspapers have dropped sharply since mid-1989, largely offset by accumulations of pulp substitutes and high grade deinking grades.

PAPER AND PAPERBOARD EXPORT TRENDS

Ever since the dollar's trade-weighted exchange rate eased from its excessively high levels of the early and mid-1980's, exports have been a major source of growth for the U.S. paper industry. In the period from 1985 to 1989, exports of paper, paperboard and converted products, as reported by the U.S. Bureau of Census, grew at an average annual rate of 11.5% and their share of overall U.S. paper and paperboard production rose from 5.9% to 8.1%. (See graph below.) Exports advanced a solid 10.6% from 1988 to 1989 and exceeded their year-ago volumes by 6.5% during the first quarter of 1990. The trade statistics for 1989 and 1990 are based on the Harmonized System codes and therefore data for specific export grades are not necessarily comparable to data for prior years.



Continued on page 12

Exports of paper totaled 1,465,752 short tons last year, up one-third relative to 1988. The biggest gainers within the paper category were newsprint, up 46.2% to 624,798 tons, and printing-writing papers, which rose 66.5% to 478,201 tons. Japan, which is the largest export market for U.S. newsprint, increased its purchases by 17.3% in 1989, to 280,983 tons. Strong gains were also recorded in U.S. newsprint exports to Taiwan, Hong Kong, and Malaysia. In all, Japan and the Far East accounted for 72% of U.S. newsprint exports last year.

Exports of printing-writing papers were paced by clay coated groundwood, which surged 153% in 1989. Exports of uncoated groundwood and uncoated free sheet also registered strong gains last year. Canada was the leading export market for U.S. printing-writing papers in 1989, accounting for 48% of tonnage exports.

Paperboard exports rose 2.9% in 1989 to 3,757,704 tons. The major paperboard export grades -- kraft linerboard and bleached board -- turned in the strongest performances, rising 9.6% and 5.9%, respectively. Exports of other unbleached kraft paperboard, semichemical corrugating medium, and recycled paperboard lost ground last year.

Last year's gain in kraft linerboard exports was mainly due to increased buying by the People's Republic of China, reversing the decline recorded during 1988. U.S. exports of kraft linerboard to Western Europe, Canada, Mexico and South America also recorded strong gains last year, but shipments to Japan and Central America declined.

The graph on page 10 shows the regional distribution of U.S. exports of paper, paperboard and converted products for the years 1979 and 1989. The region of the world that increased its share the most during the ten year period -- from 10.9% in 1979 to 22.7% in 1989 -- was the Far East & Oceania. Japan's relative share expanded from 7.2% to 11.8%. Western Europe and Latin America account for a smaller share of U.S. exports today than they did a decade ago.

Additional details regarding paper industry exports can be found in **"Exports of Pulp, Paper, Paperboard, and Converted Products to World Markets."** Copies of the report have been mailed to API member companies and are available to others for $125 (domestic) and $130 (overseas) from API's International Department.

INDUSTRY FACT SHEET
MONTHLY STATISTICAL SUMMARY INSERT
VOL. 68, NO. 5
MAY, 1990

PRODUCTION (000 TONS)

	(P) APR 1990	(R) MAR 1990	APR 1989	FIRST 4 MONTHS 1990	FIRST 4 MONTHS 1989	% CHANGE YR TO DATE 1990/1989
PAPER GRADES						
Newsprint	541	543	495	2,147	1,963	9.3
Printing & Writing	1,820	1,895	1,731	7,427	7,218	2.9
Uncoated Groundwood (s)	155	150	149	603	579	4.2
Coated Paper (s)	567	614	549	2,403	2,340	2.7
Uncoated Free Sheet Paper (s)	971	983	904	3,879	3,769	2.9
Thin Paper (s)	23	26	23	92	86	7.4
Cotton Fiber Paper (s)	13	15	14	55	56	-0.8
Bleached Bristols (s)	92	106	92	394	388	1.6
Tissue Paper	467	500	451	1,892	1,856	1.9
Total Pkg & Other Paper	394	417	374	1,608	1,651	-2.6
Unbl. Kraft Paper (s)	192	211	199	810	903	-10.3
Other Paper	202	206	175	798	748	6.7
TOTAL PAPER	3,222	3,354	3,050	13,074	12,688	3.0
PAPERBOARD GRADES						
Unbleached Kraft Paperboard	1,627	1,715	1,588	6,565	6,426	2.2
Unbleached Kraft Linerboard	1,522	1,597	1,489	6,131	6,011	2.0
Other Unbl. Kraft Paperboard	105	118	98	434	415	4.5
Semichemical Paperboard	466	485	465	1,871	1,908	-2.0
Bleached Paperboard	378	388	353	1,506	1,467	2.7
Recycled Paperboard	731	763	740	2,923	2,963	-1.3
TOTAL PAPERBOARD	3,202	3,352	3,145	12,865	12,764	0.8
TOTAL PAPER AND PAPERBOARD	6,425	6,706	6,196	25,939	25,452	1.9

WOOD PULP (ALL GRADES)	MAR 1990	FEB 1990	MAR 1989	FIRST 3 MONTHS 1990	FIRST 3 MONTHS 1989	% CHANGE YR TO DATE 1990/1989
Dissolving & Special Alpha	123	89	141	337	370	-9.0
Bleached Sulfite)	127	140	134	391	396	-1.2
Unbleached Sulfite)						
Bleached & Semi-Bl. Sulfate	2,294	2,174	2,305	6,853	6,798	0.8
Unbleached Sulfate	1,852	1,735	1,825	5,495	5,421	1.4
Semichemical	365	340	378	1,094	1,113	-1.7
Groundwood & Thermomechanical	501	509	501	1,558	1,457	6.9
TOTAL PULP DIVISION DATA	5,261	4,988	5,283	15,729	15,556	1.1

(s) - Shipments
P - Preliminary
R - Revised

AMERICAN PAPER INSTITUTE, INC.
260 Madison Avenue
New York, New York 10016

INDUSTRY DATA MAY 31, 1990	1988	1989	1990	1990 R	1990 P	AN RATE Y-T-D 90	% CH/ SAME PD 89
PAPER AND PAPERBOARD -- Tons (000)			Feb	Mar	Apr		
Total Production (API) : excluding :	76,466	76,848	6,119	6,708	6,425	77,817	1.9
Total Seasonally Adjusted : construction :			6,485	6,425	6,553	77,876	1.9
Imports (including Products) : and wet :E	12,786	12,910	1,033	1,152	1,088	13,157	3.2
Exports (including Products) : machine :E	5,559	6,264	499	597	550	6,083	8.3
Apparent Consumption : grades :	83,694	83,292	7,018	6,960	7,091	84,290	1.5
Paper Production % Tonnage Capacity	95.4 g	92.4	98.4	93.3	93.1	94.2	-
Paperboard Production % Tonnage Capacity	94.5 g	93.5	93.5	94.1	93.4	93.8	-
PAPER, PAPERBOARD AND PRODUCTS			Jan	Feb	Mar		
Imports : Including Construction and :	13,110	13,101	1,123	1,043	1,162	13,313	1.9
Exports : WMB Grades (excl. HPB) :	5,891	6,300	582	500	598	6,720	6.5
MARKET WOOD PULP PRODUCTION - Tons (000)	8,585	8,864	770	675	725	8,676	-2.0
TOTAL WOOD PULP PRODUCTION - Tons (000)	61,161 f	61,896 f	5,460	4,998	5,261	62,916	1.1
WOOD PULP IMPORTS - TONS (000)	5,039	5,005	413	425	429	5,066	-2.0
WOOD PULP EXPORTS - TONS (000)	5,528	6,231	429	419	578	5,692	-11.3
RAW MATERIALS CONSUMPTION - Tons (000)							
PAPER AND BOARD MILLS : excluding :			Jan	Feb	Mar		
Wood Pulp : consumption for :	60,294	60,725	5,330	4,867	5,171	61,550	0.9
Waste Paper : construction & :	19,021	19,987	1,786	1,617	1,804	20,757	5.5
TOTAL : WMB grades :	79,315	80,722	7,096	6,504	6,975	82,308	2.1
PULPWOOD CONSUMPTION Cords (000) Amer. Pulpwd. Assn	95,497	98,414	8,553	8,108	8,341	100,008	2.6
EMPLOYMENT (000)			Feb	Mar	Apr		
Paper and Allied Products.....Total	692.6	697.2	694.4	693.9	694.0	693.9	0.3
Pulp, Paper and Board Mills.....Total.....E	247.2	247.1	246.2	246.0	246.1	246.4	0.7
AVERAGE HOURLY EARNINGS OF PRODUCTION WORKERS ($)			Feb	Mar	Apr		
Paper and Allied Products	11.66	11.93	12.12	12.13	12.26	12.16	3.0
Pulp, Paper Mills.....E	14.31	14.71	14.98	14.99	15.21	15.03	3.5
Paperboard Mills.....E	14.49	14.76	14.97	14.97	15.19	15.03	3.5
CAPITAL EXPENDITURES, PAPER & ALLIED PRODUCTS			1989 Q3	1989 Q4	1990 Q1		
(Repl. by US Dept. of Com., Ann. Rates, Bill.$)*	11.36	15.69	15.82	17.69	18.00	17.77	12.9
INDEX OF OUTPUT PER MAN-HOUR (1977=100)			Feb	Mar	Apr		
:IN PULP, PAPER :....Production Workers	146.0	146.6	149.1	149.6	148.0	149.3	0.6
:AND BOARD MILLS:....All Employees	142.9	143.5	145.7	145.8	145.2	145.9	0.6
PAPER AND ALLIED PRODUCTS (Million $)			Jan	Feb	Mar		
Industry Shipments (Dept. of Commerce)*	127,718	130,501	10,678	10,787	10,965	129,720	-0.6
Pulp, Paper and Paperboard*	57,177	57,700	4,551	4,618	4,727	55,584	-4.8
Inventories (End of Period) - Total Industry*	12,065	12,571	12,725	12,699	12,649	12,649	6.2
Pulp, Paper and Paperboard*	4,325	4,980	4,998	4,979	4,954	4,954	9.0
PAPER AND ALLIED PRODUCTS COMPANIES (Million $)			1989 Q2	1989 Q3	1989 Q4		
Sales (Corporations Only)	107,221	112,238	28,534	28,096	28,327	N.A.	N.A.
Earnings (Corporations Only)	8,081	7,000	2,022	1,850	1,149	N.A.	N.A.
Depreciation (Corporations Only)	4,625	4,954	1,231	1,247	1,289	N.A.	N.A.
Net Worth (Corporations Only)	42,940	45,888	45,242	46,513	45,886	N.A.	N.A.
PRICE INDEXES (Bureau of Labor Stats)1982=100			Feb	Mar	Apr		
Pulp, Paper & Products, ex. Building Grades	124.8	132.4	133.3	133.2	133.4	133.3	1.8
Wood Pulp	138.7	157.4	160.3	158.0	154.3	158.1	3.2
Waste Paper	183.6	157.1	149.7	149.3	145.3	148.9	-6.2
Paper	123.2	129.6	127.5	127.4	127.8	127.7	-1.9
Paperboard	133.2	140.1	138.4	138.5	137.8	138.4	-1.0
PAPER DEMAND (INDEXED: 1987=100)			Feb	Mar	Apr		
Total Paper Production *	138.4	137.7	143.0	138.8	142.4	141.7	3.1
Paper New Supply *	144.4	142.1	145.3	145.3	146.8	146.2	3.2
Demand Indicators - (Weighted Average) *	111.1	115.8	118.2	118.7	118.7	118.3	2.7
Production of Nondurable Goods.....*....(21.2%)	103.6	106.4	108.0	107.7	107.6	107.7	1.8
Disposable Income.....*....(23.9%)	134.9	140.6	143.0	143.2	143.2	143.0	2.6
Total Printing and Publishing.....*....(34.9%)	103.6	106.6	111.4	112.3	112.4	111.7	3.1
PAPERBOARD DEMAND (INDEXED: 1987=100)							
Total Paperboard Production *	131.5	132.7	132.0	133.4	135.4	133.4	0.7
Production for Domestic Use	128.8	129.7	128.1	122.4	132.8	129.4	0.2
Demand Indicators - (Weighted Average) *	104.7	107.2	107.5	108.2	107.5	107.4	0.2
Production of Consumer Goods.....*....(62.06%)	104.0	106.6	107.2	108.2	107.1	107.1	0.5
Production of Equipment.....*....(5.75%)	107.5	112.3	113.2	114.6	113.8	113.4	2.1
Production of Materials.....*....(32.19%)	105.6	107.4	107.0	107.0	107.1	108.8	-0.6
MARKET DATA			Jan	Feb	Mar		
Consumption by Publishers - Tons (000)	13,497	13,483	1,066	1,032	1,151	12,990	0.4
Newspaper Pub. and Printing Empl. Total(000)	475	478	481	481	481	481	0.9
Magazine Advertising Pages (PIB, Inc.)	172,580	179,476	10,400	13,850	15,144	157,572	-4.2
Wholesalers Sales and Inventories (Million $)							
Total Paper & Pap. Prdcts. ,ex Wallpaper..Sales	52,377	56,803	4,392	3,936	4,458	51,144	-6.1
Inventories (End of Period)	4,436	4,506	4,171	4,050	4,018	4,018	-11.9
FIBRE BOX DATA (Fibre Box Association)			Feb	Mar	Apr		
Fibre Box Shipments (Million square feet)	308,507	313,400	24,180	26,680	25,619	315,264	0.8
Container'bd Inventory at Mill & Plant (000 Tons)	2,563	2,589	2,559	2,626	2,598	2,598	1.4
RETAIL TRADE ($billion $)			Feb	Mar	Apr		
Total Retail Sales *	1,622	1,711	148.9	148.5	148.6	1,784	6.7
Nondurable Goods Stores Sales *	905	1,062	94.9	94.9	94.8	1,135	9.0
GENERAL ECONOMIC DATA			Feb	Mar	Apr		
TOTAL INDUSTRIAL PRODUCTION (INDEX 1987 = 100)*	105.4	108.1	108.5	109.1	108.7	108.5	0.5
PRODUCER PRICES (ALL COMMODITIES) (INDEX 1982=100)	108.9	112.2	114.4	114.2	114.0	114.4	2.8
CONSUMER PRICES (ALL ITEMS-URBAN CON.) (1982-4=100)	118.3	124.0	128.0	128.7	128.9	128.3	5.1
GROSS NATIONAL PRODUCT - ANNUAL RATE ($billion$)			1989 Q3	1989 Q4	1990 Q1		
G.N.P. or Expenditure - Current $	4,881	5,234	5,281	5,340	5,431	5,431	6.2
G.N.P. or Expenditure - 1982 $	4,024	4,144	4,163	4,174	4,186	4,186	2.0
PAPER AND PAPERBOARD CONSUMPTION - POUNDS PER CAPITA	677	667				674	

f - Wood Pulp Prod exc def., explo & scr. g - Adj for holiday shutdowns R - Revised E - Last month estimated by API Y - Full year estimated by Dep't of Commerce * Seasonally Adjusted